From: eBusiness_support@epa.gov [eBusiness_support@epa.gov]

Sent: 1/23/2021 11:30:05 PM

To: Goffman, Joseph [Goffman.Joseph@epa.gov]
CC: eBusiness_Support [eBusiness_Support@epa.gov]

Subject: ACTION REQUIRED: Review and certify your EPA person profile information - Past Due (WCF reference #150d)

eBusiness

The EPA requires all employees and contractors to regularly certify their work location and work-related phone numbers in eBusiness.

You can quickly review this information on the <u>Certify Person Profile</u> page in eBusiness, or by going to https://ebusiness.epa.gov and clicking the "Person Profile Certification is Required." link in the pending actions section of the home page.

Remote Access Users: You must be connected to the EPA VPN to access eBusiness. EPA's remote access solution allows users to connect to the EPA's network from a remote location using a laptop or desktop computer connected to the internet. The Agency uses a Virtual Private Network (VPN) to securely authenticate the connection.

If you have recently changed your LAN password, you may be prompted to provide your network credentials to access eBusiness. If this occurs please enter your user name as aa\<login UserID> and enter your LAN password to access eBusiness. For example, John Smith with login id jsmith would enter aa\jsmith as his user name

Accurate Profile information is critical because certified information is used in various EPA systems including:

- EPA's Outlook Global Address Listing (GAL)
- EPA Emergency Contact System (Everbridge)
- Skype for Business Contact Card
- MS Teams Contact Card

If you have any questions, view the <u>Person Profile Certification Training Video</u> and/or contact User Profile Administrator in your organization: <u>Nicole V. Smoot</u>.

Current EPA Profile Information

First Name: Joseph Preferred Name:

Last Name: Goffman Middle Initial: M

Email: goffman.joseph@epa.gov

Organization: (11) AO Sponsor Organization
Office:

Affiliation: Political Appointee Workforce ID: Ex. 6 Personal Privacy (PP)

Office Location:

Building: WJC Building North Room: TBD

Address: 1200 Pennsylvania Ave NW

City: Washington State, ZIP: DC, 20460

No telephone numbers

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]

Sent: 2/26/2021 8:16:06 PM

Subject: February Administrative Update for Supervisors

Attachments: February 2021 Administrative Update for Supervisors V2 DV.docx

Colleagues,

OCFO and OMS are pleased to provide the Administrative Update for Supervisors. We encourage you to use this information as a guide for sharing updates on administrative activities with your staff.

If you have any comments, questions or requests for information on other topics not included in the update, please contact Shakeba Carter-Jenkins (202-564-6385).

Please stay safe and be well.

Best, Donna

Administrative Update for Supervisors February 2021

COVID-19 Updates

- Employees can read about EPA's Workplace Safety Plan on [HYPERLINK "https://workplace.epa.gov/covid19/index.html" \| "button"]. *
- Please read the FAQs for [HYPERLINK "https://www.usa.gov/safer-federal-workforce"] (leave, facilities, mask-wearing and other related topics) on [HYPERLINK "https://www.usa.gov/safer-federal-workforce"].

Mass Mailers:

- 2020 [HYPERLINK
 - "https://usepa.sharepoint.com/sites/OA_Work/epanews/newsitems/Lists/Posts/Post.aspx?ID=162 1"] Scores.
- Dan Utech's, EPA's Chief of Staff, [HYPERLINK
 "https://usepa.sharepoint.com/sites/OA_Work/epanews/newsitems/Lists/Posts/Post.aspx?ID=161
 3"] to employees about EPA's Workplace Safety Plan.
- Donna J. Vizian, Acting Assistant Administrator, [HYPERLINK "https://usepa.sharepoint.com/sites/OA_Work/epanews/newsitems/Lists/Posts/Post.aspx?ID=160 7"] on the National Defense Authorization Act to ensure leave to impacted employees is appropriately restored.
- Dan Utech's, [HYPERLINK
 "https://usepa.sharepoint.com/sites/OA_Work/epanews/newsitems/Lists/Posts/Post.aspx?ID=160
 2"] about his commitment to a safe and healthy EPA workforce.

Employee Assistance Program

EAP provided by ESPYR may be accessed 24/7 by calling (888) 635-3202. Services and information are also available at [HYPERLINK "http://www.espyr.com"]. EAP services are available to all EPA employees, including you as a supervisor. For login information, see the [HYPERLINK "https://intranet.epa.gov/ohr/benefits/eap/index-content.html"].

Join the 2021 Step It Up Challenge

Make your health a priority in 2021 and enjoy the [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.cdc.gov%2Fphysicalactivit y%2Fbasics%2Fpa-health%2Findex.htm&data=04%7C01%7CCarter-Jenkins.Shakeba%40epa.gov%7Cf1223b93d4db4e6bb96e08d8d461b10e%7C88b378b367484867acf976 aacbeca6a7%7C0%7C0%7C637492863325289454%7CUnknown%7CTWFpbGZsb3d8eyJWljoiMC4wLjAw MDAiLCJQljoiV2luMzliLCJBTil6lk1haWwiLCJXVCl6Mn0%3D%7C1000&sdata=KNM1klsfLcF2FTt3fpKeVT5V OXxfuZTTb%2FsHLUBpr08%3D&reserved=0"] by participating in the agencywide [HYPERLINK "https://intranet.epa.gov/ssd/fitness/challenges/index.htm"].

^{*} Connect to the VPN before clicking on links to the EPA intranet.

- From March 1, 2021, to May 31, 2021, participants will log their steps and exercise in a mobilefriendly [HYPERLINK
 - "https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fprojects.erg.com%2Fconferences s%2Ffitnesschallenge%2Fregisterlogin-new.htm&data=04%7C01%7CCarter-projects.erg.com%2Fconferences s%2Ffitnesschallenge%2Fregisterlogin-new.htm%2Fr
 - Jenkins.Shakeba%40epa.gov%7Cf1223b93d4db4e6bb96e08d8d461b10e%7C88b378b367484867acf976 aacbeca6a7%7C0%7C0%7C637492863325289454%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAw MDAiLCJQIjoiV2luMzliLCJBTil6lk1haWwiLCJXVCl6Mn0%3D%7C1000&sdata=xMRp2PgZqlep7YAKXN%2Fc NfVHJdR52fXETHhYch1SEGs%3D&reserved=0"] to earn points for their location's team.
- Participants should follow COVID-19 guidance from the [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.cdc.gov%2Fcoronavirus%2 F2019-ncov%2Findex.html&data=04%7C01%7CCarter-Jenkins.Shakeba%40epa.gov%7Cf1223b93d4db4e6bb96e08d8d461b10e%7C88b378b367484867acf976 aacbeca6a7%7C0%7C0%7C637492863325299412%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAw MDAiLCJQIjoiV2luMzliLCJBTiI6lk1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=gHbe8TL%2BnU9vIQrv7WiV F2u5SvjWkV45jq%2F0EfSlkro%3D&reserved=0"] and local health departments when engaging in any fitness activity.

This year's challenge includes the following features:

- Participants can join two-to-five-person groups at locations agencywide not just at their location.
- Earn extra points by participating in the new [HYPERLINK
 "https://intranet.epa.gov/ssd/fitness/challenges/index.htm" \I "clean"] in April.
- o If you have previously signed up for the challenge, you do not need to register again.
- Winners will be announced at the end of the three-month competition period.
- View success stories and tips from previous challenges on the [HYPERLINK
 "https://intranet.epa.gov/ssd/fitness/challenges/testimonials.htm"]. For more information or to sign up, visit the [HYPERLINK "https://intranet.epa.gov/ssd/fitness/challenges/index.htm"].

FY 2022 Budget

- The Agency expects the Office of Management and Budget to send EPA instructions to begin
 working on developing a high-level Fiscal Year 2022 budget proposal in a document called
 "Passback" within the next few days.
- As in many transition years the new Administration is planning to release a high-level Budget
 Blueprint in the early Spring with general descriptions of the Administration's budget proposals.
 This will be followed by the submission of a detailed budget proposal known as the
 Congressional Justifications in late Spring.

Advice of Allowance

- Each year, OCFO, OGC and OMS work together to consolidate appropriations guidance into one document called the Advice of Allowance (AOA), which should be issued in early March.

 Resource managers should read the AOA carefully, and all managers can use it as a reference.
- The AOA contains administrative, budget, contracts, finance, and grants information for FY 2021 resource operations and management. It includes directives from the "FY 2021 Consolidated Appropriations Act" and any other funding EPA received. Resource managers should read the AOA carefully, and all managers can use it as a reference. There are several attachments to the AOA, including:
 - 1) FY 2021 Appropriations Fund Codes and Treasury Symbols
 - 2) Carryover Plans and Fund Codes
 - 3) FY 2021 Program Project Reprogramming Request Form
 - 4) FY 2021 RPIO Budget Contacts, and
 - 5) FY 2021 Prohibited Activities and Congressional Directives.

ADA/Transition Reminders

- As we transition to new senior leadership, we ask everyone to remember some important
 Federal budget rules, particularly since we are welcoming new employees and managers and
 some of the Federal rules are complicated and differ from private sector or non-profit rules.
 - 1) The Anti-deficiency Act (ADA) does not have de minimus nor materiality exceptions and applies both to dollars and employee time. Any violation regardless of dollar value or time, must be reported to the President and Congress. Specifically, the Act prohibits:
 - Making a legally binding promise to spend or spending more funds than are legally available for a particular purpose.
 - Making a legally binding promise to spend or spending funds before they become legally available.
 - Accepting voluntary services except where authorized by law.
 - Making a legally binding promise to spend or spending funds **before they have been** apportioned by OMB.
 - Using funds for a different purpose for which they were provided (appropriated).
 - 2) Some types of transactions warrant special attention due to various legal restrictions, including:
 - Vehicles and transportation-related expenses
 - Clothing
 - Food
 - Awards for Non-Federal Employees
 - Novelty / Promotional Items
 - Memberships in Societies or Associations

- Any expense that might be viewed as a "personal expense" of an employee rather than a "necessary expense" of an authorized EPA program
- 3) Transitions are a good time to address maintenance issues in Presidential appointees' office space, since work can be done before new appointees and staff arrive. Consider whether there are any maintenance issues that need to be addressed prior to the assignment of space and arrival of presidential appointees.
 - a. Once appointees are confirmed, under an annual government-wide appropriations rider (Section 710), agencies must notify congressional appropriations committees prior to obligating more than \$5,000 cumulatively to "furnish," "redecorate," "purchase furniture," or "make improvements" for the entire suite of offices assigned to any presidential appointee (even if the appointee is not subject to Senate confirmation), including any space under their control or used primarily by the individual, such as a conference room. This can include some expenditures that are utilitarian / not necessarily to accommodate the personal preferences of the appointee. Contact the Office of General Counsel, Civil Rights and Finance Law Office, for more information or if you have questions.
- 4) Per Agency policy (RMDS-2520) each NPM and Regional Senior Resource Official (SRO) is responsible for ensuring that Agency funds are spent in a legal, appropriate, and efficient manner and the resource community is responsible for helping SROs carry out this role.
 - a. Since Federal administrative rules can differ from the private sector, non-profit, or even state and local spending and administrative rules, the resource community should be ready to work with SROs and new arrivals to ensure that they can efficiently comply with Federal rules such as the ones highlighted above.

Skype to Teams Transition Update

• [HYPERLINK "https://forms.office.com/Pages/DesignPage.aspx"] provides a user-friendly method for collecting data, such as surveys, polls, and quizzes. You can share your forms with everyone, including external users. By expanding the outreach of your audience, you can gather deeper insights for your projects.

How to Share with External Users

• In the Settings pane, select "Anyone with the link can respond"

Settings

9	Who can fill out this form
į	Anyone with the link can respond
	Only people in my organization can respond
	Record name
	One response per person

- While you share your Forms with external users, take note:
 - External user responses are recorded as anonymous.
 - O When the Forms link is shared with an external user, anyone with the link can respond.
 - O Please review the EPA's [HYPERLINK "https://www.epa.gov/laws-regulations/summary-paperwork-reduction-act"] as it applies to all surveys *including Forms*.

Resources

- Review EPA guidance on the [HYPERLINK "https://www.epa.gov/laws-regulations/summary-paperwork-reduction-act"]
- To learn more about how to get started with sharing your forms to external users, [HYPERLINK "https://support.microsoft.com/en-us/office/adjust-your-form-or-quiz-settings-in-microsoft-forms-f255a4ba-e03c-4e12-b880-f7e8b62e0665"].
- For technical issues, please contact the Enterprise IT Service Desk (EISD) at [HYPERLINK "mailto:EISD@epa.gov"] or 1-866-411-4372.
- (For additional information, please contact [HYPERLINK "mailto:Holland.Ramona@epa.gov"].

From: EISD [eisd@epa.gov]
Sent: 1/29/2021 5:20:51 PM

To: Goffman, Joseph [Goffman.Joseph@epa.gov]
Subject: Your incident INC0518411 has been resolved

INC0518411 - Call in numbers for TEAMS

Your incident has been resolved

Summary details

IT support has taken action to fix the reported issue and set this incident record to resolved.

Resolved by: Brian Piccolo

Resolution notes: Thank you for contacting the Office of Mission Support Web Conferencing Team. We have enabled an O365 conferencing license for your account for use with Teams and Skype. Please allow 60 minutes for the Activation email with Conf ID and PIN to be delivered.

If you plan to schedule meetings in Teams with the conference number, it will take up to 24 hours for Microsoft to configure the conference information to display in Teams. If you plan to use the conference information with Skype, please allow up to 60 minutes for the conference information to populate in a new Skype meeting.

The Office of Mission Support performs periodic monitoring of the O365 Dial-In audio conference utilization. If there is no usage for at least three months the account is disabled. For questions about how to use Skype for Business or Teams, you can call the How-to Help Center at 1-866-411-4372, option 6 or use the attached documentation on Using Microsoft Teams for Meetings.

Office of Mission Support Web Conferencing Team

Please click on the green button below to complete a survey about this Incident.

If you feel this issue has not been fully resolved, please use the **blue** button below to visit your personalized portal page, or call your local help desk to reopen the incident.

Visit the End User Portal for additional services, or call the Enterprise Help Desk at 1-866-411-4372 for assistance

Ref:MSG6994487 NxYU6fN3bsuv3743hWft

From: Microsoft Audio Conferencing [maccount@microsoft.com]

Sent: 1/27/2021 8:09:40 PM

To: Goffman, Joseph [Goffman.Joseph@epa.gov]

Subject: You now have Audio Conferencing for Microsoft Teams or Skype for Business Online – Here is your dial-in

information and PIN

You now have Audio Conferencing for Microsoft Teams or Skype for Business Online – Here is your dial-in information and PIN

Office 365 Audio Conferencing has been turned on for your account. With Audio Conferencing, you and your meeting participants can join by phone.

Name: Goffman, Joseph

Account: Goffman.Joseph@epa.gov

Your Audio Conferencing information

Here are the credentials that you and your meeting participants can use to join by phone. This information will be added to any Skype for Business or Microsoft Teams meetings you create. To join a meeting by phone, dial the conference phone number and enter the conference ID.

Conference phone number: Ex. 6 Personal Privacy (PP)

Conference ID: Ex. 6 Personal Privacy (PP)

Note: You can get additional phone numbers by clicking the "Find a local number" link in your meeting invites.

Your Audio Conferencing PIN

As the meeting organizer, you'll need to enter your PIN to start your meeting when you're the first person to join and you join by phone. As with any PIN, keep it confidential. You can reset your PIN via the reset PIN link that is included in your meeting invites or by contacting your Office 365 admin.

Audio Conferencing PIN: EL S Personal Privacy (PP)

Thi							
	s is an automatically gene	rated service commun	ication. For more in	nformation, please o	ontact your admini	strator.	

From: Dudek, Caitlin [Dudek.Caitlin@epa.gov]

on behalf of O365 Training Program [O365TrainingProgram@epa.gov]

Sent: 2/1/2021 8:29:11 PM

CC: McFarland, Tisha [McFarland.Tisha@epa.gov]

Subject: Welcome to the EPA from the Office 365 Training Team

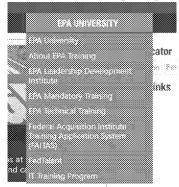
Hello new employees and welcome to EPA!



EPA's Office of Mission Support (OMS) offers live and recorded training on a variety of Office 365 tools. The Office 365 Training Program offers professional, live training on standard EPA software to all employees. Courses are 1-2 hours long and are taught via Teams. See the information below for how to join the live sessions or view the recorded training classes.

Live Trainings

Live webinars are posted monthly on <u>FedTalent</u> and are available to all employees for no cost. To view the Office 365 Training Program classes:



- Go to http://intranet.epa.gov/
- Hover over EPA University
- Select FedTalent and sign in
- Click on EPA Office 365 Training

Recorded Trainings

Can't make it to a live class? Recorded trainings are available to view any time on the <u>Training on Demand page</u> of the <u>O365 Training SharePoint site</u>.

How-to Help Center

You can call EPA's "how-to" help center to ask a how-to question about any Microsoft tool, including Skype, SharePoint, or Outlook. Questions can be simple or advanced. This service is available at no extra cost to all employees.



1-866-411-4EPA (4372), select option 6 Hours 7am - 9pm ET, Monday-Friday.

Check us out!

From, EPA's Office 365 Training Team

EPA's Office 365 Training Team

Message

From: Vizian, Donna [Vizian.Donna@epa.gov]

Sent: 1/29/2021 11:40:20 PM

Subject: January Administrative Update for Supervisors

Attachments: January 2021 Administrative Update for Supervisors VS 2.docx

Colleagues,

OCFO and OMS are pleased to provide the Administrative Update for Supervisors. We encourage you to use this information as a guide for sharing updates on administrative activities with your staff. If you have any comments, questions or requests for information on other topics not included in the update, please contact Shakeba Carter-Jenkins (202-564-6385).

Please stay safe and be well.

Best,

Donna

Administrative Update for Supervisors January 2021

COVID-19 Updates

- To halt the spread of COVID-19 and protect the federal workforce and people interacting with them, President Biden signed on January 20 an executive order that [HYPERLINK "https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-protecting-the-federal-workforce-and-requiring-mask-wearing/"]. This order also provides other information regarding protecting the federal workforce.
- Employees can read about the COVID-19 Vaccine in the Related Information section on [HYPERLINK "https://workplace.epa.gov/covid19/index.html" \I "button"]. *

Additional Executive Orders Signed by President Biden

- Read the January 20, [HYPERLINK "https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/"]which includes in Section 10 the revocation of the September 22, 2020 Executive Order 13950 Combatting Race and Sex Stereotyping.
- Read the January 22, [HYPERLINK "https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/22/executive-order-protecting-the-federal-workforce/"] which also includes the revocation of Schedule F.

Reminder Mass Mailer:

• In his first agency message to federal employees, Dan Utech, EPA's Chief of Staff, shares President Biden's new Executive Orders and staff updates in his [HYPERLINK "https://usepa.sharepoint.com/sites/OA_Work/epanews/newsitems/Lists/Posts/Post.aspx?ID=158 8"].

Employee Assistance Program

• EAP provided by ESPYR may be accessed 24/7 by calling (888) 635-3202. Services and information are also available at [HYPERLINK "http://www.espyr.com"]. EAP services are available to all EPA employees, including you as a supervisor. For login information, see the [HYPERLINK "https://intranet.epa.gov/ohr/benefits/eap/index-content.html"].

Employee Engagement Guide - please share with your teams

- EPA's [HYPERLINK
 - "https://usepa.sharepoint.com/:b:/s/OARM_Community/EVS/community%20of%20practice/EV4xow_k E_5 PoiQDclbJ2WQBbQQj-ge0OfgkAsZisYIA1A" \h] is now available. The guide presents research-based leading practices in the following areas:
 - 1) Employee Recognition
 - 2) Work/Life/Wellness Balance
 - 3) Team Building
 - 4) Professional Development

^{*} Connect to the VPN before clicking on links to the EPA intranet.

- 5) Communication
- 6) Engagement Networks (Best Places to Work Groups)
- The Employee Engagement Guide caters to engagement communities, practitioners, supervisors, and employees interested in management. To learn more, visit the [HYPERLINK "https://usepa.sharepoint.com/sites/OARM_Community/EVS/community%20of%20practice/SitePages/Community%20Home.aspx" \h] or contact [HYPERLINK "mailto:Engagement@epa.gov" \h].

Federal Employee Paid Leave Act (FEPLA) and Temporary Time Reporting Codes

Effective immediately, employees who are currently eligible to use paid parental leave must now use the time reporting code(s) below and discontinue using the interim code NEWCD. The temporary codes may be used retroactively starting October 1, 2020.

- PDPLA Adoption
- o PDPLB Birth
- o PDPLF Foster
- Employees are also required to submit absence requests for the paid parental leave using the corresponding Absence Type(s) located under the ADMIN Leave Type Leave Category on the leave request.
- Employees who used the interim code NEWCD for paid parental leave are required to attest and submit corrected timecards and their supervisors must approve leave requests and the corrected timecards by **February 27, 2021**.
 - If an employee submitted a leave request using the interim code NEWCD, the supervisor will need to cancel the leave request so the employee may submit another leave request using one of the temporary codes above.
- Specific instructions on correcting timecards and leave requests will be provided during FEPLA
 Office Hour Webinar from 1 pm 2 pm on February 4.
- Employees or supervisors must [HYPERLINK "https://gcc01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fforms.office.com%2FPages%2FR esponsePage.aspx%3Fid%3Ds3iziEhnZ0is-Xaqy-ymp2PAm-2X4HtBkcJfkNA89q5UOE1HWU9QWlpQNllaOUpCQVFPNVdFSE5MRS4u&data=04%7C01%7CCarter-Jenkins.Shakeba%40epa.gov%7Cc65879b836a14cd03a3a08d8c13f3d51%7C88b378b367484867acf976a acbeca6a7%7C0%7C637471824646065011%7CUnknown%7CTWFpbGZsb3d8eyJWljoiMC4wLjAwM DAiLCJQIjoiV2luMzliLCJBTil6lk1haWwiLCJXVCl6Mn0%3D%7C1000&sdata=UEZIDuHExxz19ccl0IJbCvuO7q spzlCtRGfgHWNDq4s%3D&reserved=0"] or view recorded webinar sessions on the [HYPERLINK "https://usepa.sharepoint.com/sites/OCFO/ots/Pages/Federal-Employee-Paid-Leave-Act.aspx"].
- For additional information on paid parental leave usage and procedures, please refer to the
 January 19, 2021, [HYPERLINK
 "https://usepa.sharepoint.com/sites/OA_Work/epanews/newsitems/Lists/Posts/Posts.aspx?List=6be739
 31-80a3-4fdf-b8d4-54026cfa77ae&ID=1585&Web=cf735250-9e8f-4a4e-b1e0-ef91785e4b1e"] on the
 topic.

Diversity Outreach Webinar Series (February 10th-25th)

 To help increase diversity of the EPA applicant pool, the Shared Service Centers will host five webinars, each targeting a specific audience from HBCUs/PBIs, Hispanic/Latinx Serving

- Institutions, Asian-American/Pacific Islander Serving Institutions, and Native Serving Institutions/Tribal Colleges.
- EPA managers have been encouraged to advertise vacancies (especially entry level openings or Pathways positions) on USAJobs between Wednesday, February 10 through Wednesday, March 3 to provide attendees real-time opportunities to apply to EPA vacancies.
- For Students and Alumni of:
 - Historically Black Colleges & Predominantly Black Institutions
 - February 10, 2021; 10am-11am EST- Join TEAMS Live Event [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/ap/t-59584e83/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fmeetup-join%2F19%253ameeting_NjJkODlwZjltOTc5OC00MGU3LTg3YjAtYzkwNTllMzJmNzY3%2 540thread.v2%2F0%3Fcontext%3D%257b%2522Tid%2522%253a%252288b378b3-6748-4867-acf9-76aacbeca6a7%2522%252c%2522Oid%2522%253a%252244138865-6fb9-4a1e-a431-

0e12db36a32d%2522%252c%2522 Is Broadcast Meeting%2522%253 a true%257d&data = 0.04%7C01%7C Carter-

- February 23, 2021; 2pm-3pm EST -Join TEAMS Live Event [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/ap/t-59584e83/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fmeetup-join%2F19%253ameeting_MTFIMDQyMDktNWM2NC00YmM2LTg3ZmEtNWM1Yjg4ZjUx NDg1%2540thread.v2%2F0%3Fcontext%3D%257b%2522Tid%2522%253a%252288b378 b3-6748-4867-acf9-76aacbeca6a7%2522%252c%2522Oid%2522%253a%252244138865-6fb9-4a1e-a431-
 - 0e12db36a32d%2522%252c%2522 Is Broadcast Meeting%2522%253 a true%257d&data = 0.04%7C01%7C Carter-

- Native Serving Institutions & Tribal Colleges
 - February 16, 2021; 10am -11am EST Join TEAMS Live Event [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/ap/t-59584e83/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fmeetup-join%2F19%253ameeting_MWQzZTUyYTYtMDBmMS00MWM0LTgyMDEtMTBlMmJmMj M0MjQ2%2540thread.v2%2F0%3Fcontext%3D%257b%2522Tid%2522%253a%252288b 378b3-6748-4867-acf9-

76aacbeca6a7%2522%252c%2522Oid%2522%253a%252244138865-6fb9-4a1e-a431-0e12db36a32d%2522%252c%2522IsBroadcastMeeting%2522%253atrue%257d&data=04%7C01%7CCarter-

Jenkins.Shakeba%40epa.gov%7Cb4a7cd40f72f4a9a711308d8c2db842f%7C88b378b367 484867acf976aacbeca6a7%7C0%7C0%7C637473595363076849%7CUnknown%7CTWFp bGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzliLCJBTiI6lk1haWwiLCJXVCI6Mn0%3D

%7C1000&sdata=Pm3vVx%2FuC5eLneyfSpBoSOEwvN8Do8Tfkxf6aTp7%2FOo%3D&reserved=0"]

- Hispanic and/or Latinx Serving Institutions
 - February 18/2021; 10am-11am EST- Join TEAMS Live Event [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/ap/t-59584e83/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fmeetup-join%2F19%253ameeting_NTA3ZTY5MTItYTU4NS00MWQzLWJhMjAtNzgyZjJlY2I4OWMy %2540thread.v2%2F0%3Fcontext%3D%257b%2522Tid%2522%253a%252288b378b3-6748-4867-acf9-76aacbeca6a7%2522%252c%2522Oid%2522%253a%252244138865-6fb9-4a1e-a431-

0e12db36a32d%2522%252c%2522IsBroadcastMeeting%2522%253atrue%257d&data=0 4%7C01%7CCarter-

 $\label{lem:lem:shakeba} Jenkins. Shakeba \%40epa.gov \%7Cb4a7cd40f72f4a9a711308d8c2db842f\%7C88b378b367484867acf976aacbeca6a7\%7C0\%7C0\%7C637473595363086806\%7CUnknown\%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzliLCJBTiI6lk1haWwiLCJXVCI6Mn0\%3D\%7C1000&sdata=rOHZo0ocvvg5ceoLtloGAGC%2Fw961dR2OdkaaJSpjyYM%3D&reserved=0"]$

- Asian -American and Pacific Islander Serving Institutions
 - February 25, 2021; 10am-11am EST- Join TEAMS Live Event [HYPERLINK "https://gcc02.safelinks.protection.outlook.com/ap/t-59584e83/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fmeetup-join%2F19%253ameeting_YTlkYmYxYzEtODgwOS00MzZlLWE4NGMtOTU3Yzk5MDc3ZDQ 0%2540thread.v2%2F0%3Fcontext%3D%257b%2522Tid%2522%253a%252288b378b3-6748-4867-acf9-76aacbeca6a7%2522%252c%2522Oid%2522%253a%252244138865-6fb9-4a1e-a431-

0e12db36a32d%2522%252c%2522lsBroadcastMeeting%2522%253atrue%257d&data=0 4%7C01%7CCarter-

Application Repository: Returned Peace Corps Volunteers

- To consider candidates who are eligible for non-competitive appointments, including Returned Peace Corps Volunteers (RPCVs), Hiring Managers can access an application repository of eligible RPCVs.
- This repository is updated regularly and includes academic achievements, transcripts, resumes, and Descriptions of Service. Where possible, applicants have also provided their fields of interest and preferred duty locations.
 - To access the RPCV Application Repository and begin reviewing applicants, click [
 HYPERLINK "https://usepa.sharepoint.com/sites/oarm_Work/OARM-RTP-Work/HRMD Work/Liaisons/Lists/Peace%20Corps%20Repository/AllItems.aspx"].
 - For guidance on how to hire an RPCV, click [HYPERLINK "https://usepa.sharepoint.com/sites/oarm_Work/OARM-RTP-Work/HRMD-Work/Liaisons/SitePages/Returned%20Peace%20Corps%20Volunteers.aspx"].
 - For information on other non-competitive appointments, visit these resources: [HYPERLINK "https://usepa.sharepoint.com/sites/oarm_Work/OARM-RTP-Work/HRMD-

Work/Liaisons/SitePages/VRA%20Appointment.aspx?csf=1&e=qJMhtC&cid=3618e0b6-0f99-4d42-8775-24424dfb3598"], [HYPERLINK

"https://usepa.sharepoint.com/sites/oarm_Work/OARM-RTP-Work/HRMD-

Work/Liaisons/SitePages/Schedule%20A%20 (Disability)%20 Appointment. as px?csf=1&e=NoSdK8&cid=688ef5dc-51b3-4eda-8d51-f82475 aada45"], [HYPERLINK]

"https://gcc01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.opm.gov%2Fpolic y-data-oversight%2Fhiring-information%2Fdirect-hire-authority%2F%23url%3DFact-Sheet&data=04%7C01%7CCarter-

Budget and Operating Plan Update

- Congress passed the Consolidated Appropriations Act, 2021 on December 27, 2020 funding the government for FY 2021.
- Under the direction of the new Administration, OCFO is working with the NPMs and Regions to prepare a FY 2021 operating plan, to submit to Congress in mid-February as required by the Congressional Joint Explanatory Statement.
- OCFO provided FY 2021 funding through February 27 to agency programs and will be able to provide the full fiscal year funding once the agency operating plan is submitted to Congress.

Travel Card Training

- The new FY 2021 Environmental Protection Agency's Travel Training is now available in [HYPERLINK "https://epafedtalent.ibc.doi.gov/"] and travel cardholders are required to take the training by September 20, 2021.
- This training includes a separate Updates & Highlights section, which specifically references recent changes in travel policy related to Covid-19, actual expense reimbursement, high dollar travel, travel accommodations, cost comparisons and Uber & Lyft, which were recently deemed as authorized and reimbursable modes of transport.
- Travel cardholders must remember to use their travel cards for official authorized purposes only. For example, Travelers need to be mindful to switch their Uber/Lyft accounts to charge the proper credit card for personal verses official travel expenses.
- The Travel Training is required every year only for EPA employees who have been issued a travel card. FedTalent will track completion and travel cardholders who do not take the course in time will have their travel accounts suspended.
- To access the training, employees must first click on the eLearning button located on the One EPA Workplace intranet page, before logging on with either your Username and Password or PIV card.
- Should you have any questions, please email [HYPERLINK "mailto:FedTalent_Resource_Desk@epa.gov"] or [HYPERLINK "mailto:Virgille.Joanne@epa.gov"].

Skype to Teams Transition Update

Reminder: Skype will be discontinued on January 31.

- On Monday, February 1, Microsoft Teams will be the only collaboration tool for meetings and chat conversations for EPA.
- All EPA employees have been assigned an Office 365 audio conference line linked to their Teams meetings. Here are a few things to know:
 - When you host a Teams meeting, you and those invited to attend will have the option to join the meeting using a phone.
 - The dial-in number and conference ID for the meeting will be automatically populated in your invitations.
 - For increased security, the conference ID will automatically change for each meeting you schedule.

What the Transition Means for You

- Once Skype is removed, you won't be able to chat or schedule meetings in Skype.
- You will have access to previous Skype chats and conversations in your Outlook Conversation History folders.
- You will still be able to attend Skype meetings hosted by external partners.
- All the actions you could previously do in Skype, you will continue to be able to do in Teams.
- Please encourage your employees to start familiarizing themselves with Teams and using it for meetings, chat and calling, if they are not already.

Learn More

- OMS is providing training to all employees; you can sign up via the [HYPERLINK "https://usepa.sharepoint.com/sites/oei_Community/ittraining/SitePages/Home.aspx" \t "_blank"].
- We recommend employees join [HYPERLINK "https://gcc01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fte am%2F19%253a1f6226032573403f936f95e1a603b49a%2540thread.skype%2Fconversations%3Fgroupld %3D8559d3c6-d2e9-4c00-bed9-46e8cfed45ab%26tenantld%3D88b378b3-6748-4867-acf9-76aacbeca6a7&data=04%7C01%7CBruecker.Corey%40epa.gov%7Cf06e6f178b91418c7e6408d8bc82430 e%7C88b378b367484867acf976aacbeca6a7%7C0%7C0%7C637466614938047419%7CUnknown%7CTW FpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTil6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sd ata=xXsnOg03zGcZs7D0OPSWo4c509LA17QDgw1dPL397Jo%3D&reserved=0"], where you can find guidance documents and connect with people across EPA who can answer your Teams questions.
- In addition to the resources already listed, you can contact the [HYPERLINK "https://intranet.epa.gov/ittraining/howtohelpcenter/?utm_campaign=IT&utm_medium=AgencyMass Mailers&utm_source=VaughnNoga&utm_content=201029"] at (866) 411-4372, Option 6 for one-on-one assistance with Teams or any O365 application.
- If you encounter any issues during this transition, please submit a ticket through Enterprise Information Technology Service Desk (EISD) by calling 1 (866) 411-4EPA (4372) and Press Option 3 or emailing [HYPERLINK "mailto:EISD@epa.gov"]. You can also contact your [HYPERLINK "http://workplace.epa.gov/itsupport.html?utm_campaign=IT&utm_medium=AgencyMassMailers&utm_source=VaughnNoga&utm_content=201029"].
- For more information, contact [HYPERLINK "mailto:Kefle.Fisseha@epa.gov"], 202-566-1459.

Loss of Functionality of SharePoint 2010 Workflows in Office 365

- Microsoft will remove the ability to run, create or execute SharePoint 2010 workflows in Office 365 beginning March 1.
- Regional and Office O365 [HYPERLINK
 - "https://usepa.sharepoint.com/sites/oei_Work/SharePointPM/SCA/Lists/SCA%20List/AllItems.aspx?vie wpath=%2Fsites%2Foei_Work%2FSharePointPM%2FSCA%2FLists%2FSCA%20List%2FAllItems.aspx" \t "_blank"] (SCAs) and site owners are converting critical SharePoint 2010 workflows into Power Automate.
 - After March 1, SharePoint 2010 workflows will no longer work.
 - SCAs are focusing primarily on converting workflows they have designated as critical to their Office/Region; they expect other workflows to stop working without impact to their office's projects.
 - OMS has asked all SCAs to update a [HYPERLINK "https://usepa.sharepoint.com/:x:/r/sites/oei_Work/SharePointPM/SCA/_layouts/15/Doc.aspx? sourcedoc=%7B59D8E63A-1A1A-4467-9F7B-282CC29EC5AB%7D&file=Status%20of%202010%20Workflow%20Conversion%20by%20Office.xl sx&action=default&mobileredirect=true" \t "_blank"] to identify and track the status of their critical workflows.
 - Please contact your [HYPERLINK
 "https://usepa.sharepoint.com/sites/oei_Work/SharePointPM/SCA/Lists/SCA%20List/AllItems.a spx?viewpath=%2Fsites%2Foei_Work%2FSharePointPM%2FSCA%2FLists%2FSCA%20List%2FAllIt ems.aspx"] for specific information about your office's workflows.
- For more information, contact [HYPERLINK "mailto:Martiny.Sally@epa.gov"], 202-564-6067.

Moving Away from Personal Desktop Tandberg Units

- With the transition to [HYPERLINK "https://intranet.epa.gov/myworkplaceinfo/teams.html"] on February 1, OMS plans to move away from the use of personal desktop Tandberg units located in personal offices.
- Teams is now the Agency unified communication tool so OMS strongly encourages employees to transition from using their personal Tandberg units for video conferencing and to surplus the units upon returning to the office.
- In addition, the new Agency video conferencing equipment standard is Microsoft Meeting Room Systems (MMRS).
 - MMRS enables EPA to replace its Cisco Tandberg video conferencing units located in conference rooms with a cost effective O365-integrated solution. MMRS provides the following benefits:
 - Brings video conferencing to any size conference room
 - Works seamlessly with Teams
 - Significantly reduces the cost of adding or replacing video conferencing equipment
- MMRS equipment can be ordered via [HYPERLINK
 "https://ebusiness.epa.gov/ebusiness/index.cfm?event=catalog.extendedinfo&oidCatalog=484"] under

the NB product code. For more information about MMRS capabilities, please see the [HYPERLINK "https://cfint.rtpnc.epa.gov/oito/video/mmrs.cfm"]

• For more information, contact: [HYPERLINK "mailto:keels.dwane@epa.gov"], 202-566-2684.

Message

From: Mobile Device Notice [Mobile_Device_Notice@epa.gov]

Sent: 1/29/2021 4:17:51 PM

To: EPA-MobileDevice-Notifications [EPA-MobileDevice-Notifications@epa.gov]

Subject: Farewell Skype - Hello Teams!

Attachments: Skype.jpeg

Good Morning Mobile User Community.

Beginning February 1^{st} , you'll begin to see the attached message when trying to access Skype from your EPA issued mobile device.

Thanks, Mobile Team

Office of Mission Support

Visit the Mobile Device Website

Check out our Mobile Device SharePoint Site

From: OMS-MassMailer-Mailbox < OMS-MassMailer-Mailbox@epa.gov>

Sent: Thursday, January 28, 2021 12:54 PM

To: EPA-DynamicMassMailer < EPA-DynamicMassMailer@epa.gov>

Subject: Farewell Skype - Hello Teams!





It was a great run, but it's time to say goodbye to Skype. Starting February 1, Microsoft Teams will be EPA's primary tool for virtual meetings and chat. Here on the "Teams" team, we use it daily to get our work done. We are excited about the improved, streamlined experience that transitioning to Teams will provide EPA employees. One of the best places to learn more about Teams is the <u>Teams Users Community</u>. The "Teams" team will be there to answer your questions.

Here's the plan. (Note: Please connect to the VPN to access links in this email.)

What to know on February 1

• Teams will be EPA's enterprise tool for meetings and chat conversations.

Teams can do everything Skype does (and more!), but it works a little differently. Check out these <u>Teams Tips</u> to get started.

- You will no longer be able to use Skype for chatting or meeting.
- O You will retain access to previous Skype chats and conversations in your Outlook Conversation History folder.
- You can attend Skype meetings hosted by people external to EPA.

- All employees now have <u>Office 365 Audio Conferencing accounts</u>, which populate in your Teams meeting invitations.
- o For increased security, the conference ID changes for each meeting. (The phone number and PIN remain the same). See the <u>0365 Audio Conferencing guide</u> for more information.
- All your meetings currently scheduled in Skype will be converted into Teams meetings automatically. Please double check that your meeting information transitioned correctly; <u>more details here</u>.

Resources to get you started

- We recommend you attend the 1-hour Skype to Teams transition training provided by OMS or our biweekly Teams Office Hours. Find upcoming dates and sign up on the O365 Training Calendar.
- o View the <u>recorded Intro training</u> or the PowerPoint presentation.
- Work is Better with Microsoft Teams (4 min video)
- o <u>Top Teams Tips</u> (pdf)



Figure 1: Employees meeting in Teams. "It's going to be a great day!"

- Join EPA's <u>Teams Users Community</u>, where you'll find <u>Teams Resources</u> and can connect with people across EPA who can answer your questions.
- Call the <u>How-to Help Center for Microsoft Applications</u> at (866) 411-4372, Option 6 for one-on-one assistance with Teams (or any O365 tool).

We know that often, change is hard, and that is why we are here to help! One of the best ways to get in touch with us is to join the <u>Teams Users Community</u>. We'll be there to answer your questions.

For technical support, contact the Enterprise Information Technology Service Desk (EISD) by calling 1 (866) 411-4372, Option 3, or emailing EISD@epa.gov. You can also contact your local IT Help Desk Support.

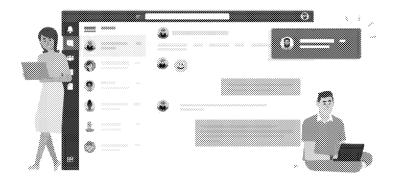
Previous Communications

CIO Announcement (10/29/20)
Skype to Teams Transition: How to Prepare (1/11/21)

Good luck, and we'll see you in Teams!

From, The "Teams" Team

Your organization is now using Microsoft Teams!



We'll help you find your contacts, chats, and more once you go to Teams.

If you need to join a Skype for Business meeting or see past conversations, go ahead and start Skype for Business.

Learn More



Start Skype for Business

Appointment

From: Ellis, John [Ellis.john@epa.gov]

Sent: 1/26/2021 5:45:54 PM

To: Goffman, Joseph [Goffman.Joseph@epa.gov]; Carbonell, Tomas [Carbonell.Tomas@epa.gov]; Chaudhary, Dimple

[Chaudhary.Dimple@epa.gov]; Fox, Radhika [Fox.Radhika@epa.gov]; Mayock, Andrew [Mayock.Andrew@epa.gov];

Freedhoff, Michal [Freedhoff.Michal@epa.gov]; Murray, Paulette [Murray.Paulette@epa.gov]

CC: Ramsey, Jody [Ramsey.Jody@epa.gov]; Hauser, Mitchell [hauser.mitchell@epa.gov]; Williams, LaShawn

[williams.lashawn@epa.gov]; Stingel, Shawn [Stingel.Shawn@epa.gov]; Adams, Denise [Adams.Denise@epa.gov]

Subject: Records Management Briefing for Senior officials and Political Appointees

Attachments: Michal_Freedhoff _Records Mgmt Brfg for Sr Officials - fillable-font.pdf; Andrew_Mayock _Records Mgmt Brfg for Sr

Officials - fillable-font.pdf; Radhika_Fox_Records Mgmt Brfg for Sr Officials - fillable-font.pdf; Dimple_Chaudhary _Records Mgmt Brfg for Sr Officials - fillable-font.pdf; Melissa_Hoffer _Records Mgmt Brfg for Sr Officials - fillable-font.pdf; Tomas_Carbonell _Records Mgmt Brfg for Sr Officials - fillable-font.pdf; Joseph_Goffman _Records Mgmt

Brfg for Sr Officials - fillable-font.pdf

Location: Microsot Teams Meeting

Start: 1/28/2021 2:00:00 PM **End**: 1/28/2021 3:00:00 PM

Show Time As: Tentative

Required Goffman, Joseph; Carbonell, Tomas; Chaudhary, Dimple; Fox, Radhika; Mayock, Andrew; Freedhoff, Michal; Murray,

Attendees: Paulette

Optional Ramsey, Jody; Hauser, Mitchell; Williams, LaShawn; Stingel, Shawn; Adams, Denise

Attendees:

Greetings, All new Senior Officials and Political Appointees are required to attend a Records Management Briefing. I am sending this invite for 9:00am tomorrow and another for 9:00am Thursday, 1/28/2021. Please accept one or the other. The briefing will take approximately 45 minutes, depending on the number of questions.

I have attached individual slide decks for your convenience and to provide you with an acknowledgement page for your digital signature and response after taking the briefing.

Thank-you. John Ellis, Agency Records Officer

Microsoft Teams meeting

Join on your computer or mobile app

Click here to join the meeting

Or call in (audio only)

Ex. 6 Personal Privacy (PP) United States, Washington DC

Phone Conference ID: Ex. 6 Personal Privacy (PP)

Find a local number | Reset PIN

By participating in EPA hosted virtual meetings and events, you are consenting to abide by the agency's terms of use. In addition, you acknowledge that content you post may be collected and used in support of FOIA and eDiscovery activities.
Learn More Meeting options



Records Management Briefing for Senior Officials and Political Appointees

Joseph Goffman
Principal Deputy Assistant Administrator for Air
and Radiation
Office of Air and Radiation (OAR)

Provided by the Office of Mission Support



Statutes, Regulations & Policy

- The Federal Records Act and related National Archives and Records
 Administration (NARA) regulations govern federal agencies' creation and
 preservation of records that document their organization, functions, policies,
 decisions, procedures and essential transactions (44 U.S.C. 31; 36 CFR Chapter
 XII, Subchapter B)
- A document is a record if it is:
 - created or received by a federal agency under "federal law or in connection with the transaction of public business" and
 - "preserved or appropriate for preservation by that agency. . . as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the United States Government or because of the informational value of data in them" (44 U.S.C. 3301, Definition of Records)
- Records may be in any physical or electronic format, including paper, emails, instant messages, text messages, telephone messages, social media, Word documents, spreadsheets, and information systems



Statutes, Regulations & Policy

- The EPA Chief Information Officer (CIO) is responsible for establishing policies/procedures and establishing and maintaining a continuing program to manage and secure records (EPA Delegation 1-84, Information Resources Management)
- EPA's Interim *Records Management Policy* (CIO 2155.4) outlines the records management responsibilities of all EPA employees, including:
 - Creating records that document their activities
 - Filing records for safe storage and efficient retrieval
 - Disposing of records according to Agency records schedules
 - Safeguarding records against removal or loss
- A records schedule is an EPA document approved by NARA that provides specific, mandatory instructions for managing records, including when the records must be closed, how long the records must be maintained and the final disposition of the records (i.e., destruction or transfer to NARA)



Types of Records

- Permanent Records Records that have sufficient historical or other value to be preserved permanently by NARA, beyond the time the records are needed for administrative, legal or fiscal purposes
- Temporary Records Records that have temporary value and can be destroyed either immediately or after a specified retention period, based on NARA-approved records schedules. There are two categories of temporary records:
 - Transitory Records of short-term interest (90 days or less) that have minimal or no documentary or evidentiary value
 - Substantive or Non-transitory Records with temporary value that must be preserved based on approved records schedules



Non-Records and Personal Papers

- Non-Records documents with no real evidentiary value, including extra copies
 of documents maintained solely for reference/convenience and printed materials
 maintained for reference purposes
- **Personal Papers** documents belonging to an individual that are *not* used to conduct agency business and that relate only to the individual's own affairs and are used just for the individual's convenience. Examples include:
 - Leave and Earnings statements
 - Tax documents (W-2 forms)
 - Documents for professional, political or civic activities that are not used to conduct Agency business
 - Materials brought to the workplace from home or a previous job
 - Personal papers should be maintained separately from federal records



Senior Officials' Records

- Records of EPA's Senior Officials are especially important because they document significant Agency decisions and commitments
- Many records of Senior Officials are considered to be permanent and are transferred to NARA after 15 years
- Examples of Senior Officials' records include:
 - Calendars, schedules, daily activity logs
 - Emails/attachments and other electronic documents that are federal records
 - Directives, policies, and guidance
 - Program development files

- Verbal decisions and instructions
- Controlled and major correspondence
- Speeches and testimony
- Files of meetings with the Administrator
- Reports to the President or Congress



Records Management Responsibilities

It is your responsibility to:

- Manage your records yourself or designate an individual who will manage them for you
- Ensure that your records are placed in an approved Agency recordkeeping system
- Complete EPA Form 3110-49 EPA Records Management Checklist for Separating/Transferring or Separated Personnel and identify and transfer records prior to departing the Agency or moving to a different position within EPA



Records Management Guidance

- Records you create or receive in the conduct of Agency business during your tenure belong exclusively to EPA.
- Document, in an approved Agency records management system, the substance of meetings and conversations where decisions are made, issues are resolved, or policy is established
- In general, do not use a non-EPA messaging system (e.g., personal email or personal mobile device) to conduct Agency business
- In rare situations when a non-EPA messaging system must be used and a federal record is created or received, you must
 - copy your EPA email account when initially creating or transmitting the record or
 - forward a complete copy of the record to your EPA email account within 20 days of the original creation or transmission of the record; and



Records Management Guidance

- EPA strongly discourages the use of text messages to transmit Agency records. If
 a text message is a record, then the message and related contextual information
 (e.g., to, from, date, time and subject) must be forwarded to the EPA email
 system
- Do not download any unapproved software or applications to EPA computers or mobile devices
- Documents you create or receive may also need to be maintained pursuant to the Freedom of Information Act (FOIA), litigation or other legal requirements.
 Both records and non-records may be subject to FOIA or litigation requests
- There may be criminal penalties for unauthorized removal or destruction of records. Departing officials and employees may not remove extra copies of records or other work material without prior approval

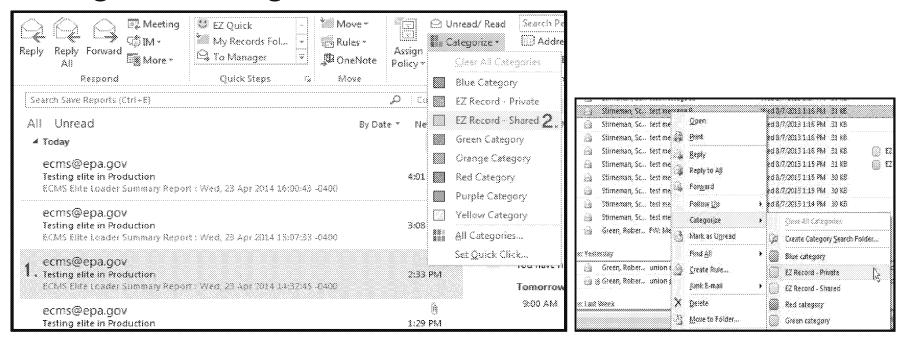


What is the Enterprise Content Management System (ECMS)?

- ECMS is EPA's recordkeeping system. It provides a set of applications which employees use to:
 - capture and save electronic records in a secure repository
 - search for records
 - share records with appropriate users
 - control user access to records
 - provide a records audit trail
- The <u>EZ Email Records</u> Application: enables you to save emails as records. It is integrated directly into Outlook Desktop Client and the Outlook Web Application (OWA)
- The <u>EZ Desktop Records</u> Application: enables you to save your records from local storage (computer hard drives, network shared drives) to EPA's records repository in one step. It is integrated directly into your Windows desktop.
- ECMS also supports system-to-system records transfer, supporting some Agency systems (e.g., CMS) in managing the retention and final disposition of their records
- Further information about the ECMS tool is available at http://intranet.epa.gov/ecms



Saving Emails Using the EZ Email Records Tool



In both Outlook Desktop and OWA, click on the email you want to save as a record. Then click on "Categorize" on the Ribbon. Alternatively, right-click the message you want to save as a record and hover over the "Categorize" choice. You will then choose whether to save it as "EZ Record - Private" or "EZ Record - Shared" record. It is recommended that you select "Shared," since Shared records are automatically viewable by other personnel in your business unit.

Further information: http://intranet.epa.gov/ecms/emailrecords



Saving Desktop Records Using the EZ Desktop Tool



Determine if the electronic file is a record. Determine if the record requires restricted access. Drag-and-drop the record to the appropriate EZ Desktop Records icon (Shared or Private) on your Desktop. Alternatively, Right-click on the file, then Select "Send to" and select the appropriate EZ Desktop Records option. On a regular cycle, the records will be saved automatically.

When you categorize a record as "Private," it will not be viewable to others. Please note that your Records Liaison Officer and Records Administrators with ECMS administrative privileges have the ability to change the categorization from "Private" to "Shared," at which point the record would then be viewable to other personnel within your office.



Capstone Approach for Email Records Management

- Under the Managing Government Records Directive (M-12-18), issued by the Office of Management and Budget (OMB) and NARA, federal agencies must manage both permanent and temporary email records in an accessible electronic format
- Capstone is an automated email records management approach that retains employees' emails, calendars and Skype messages for a specified period of time based on the position they hold within the Agency



Capstone Approach to Email Records Management

- EPA's initial Capstone approach includes the following retention categories for email records:
 - Permanent Retention: The email records of designated Capstone Officials are considered to be permanent and will be transferred to NARA after 15 years.
 These individuals are generally responsible for EPA policy- and missionrelated actions and send and receive emails of permanent value
 - Temporary retention: The email records of non-Capstone employees are considered temporary and will be saved in the EPA email system for 10 years, before being deleted
- **Exceptions:** Non-Capstone employees who have email records that are subject to retention periods longer than 10 years, based on EPA records schedules, must save those records into ECMS using the EZ Email Records tool



Contacts

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(202) 564-2691

http://intranet.epa.gov/records
http://intranet.epa.gov/ecms

Enterprise IT Service Desk: eisd@epa.gov,

Andrew Yuen ECMS Project Manager yuen.andrew@epa.gov (202) 566-1308

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stingel.shawn@epa.gov

202-564-1503

http://intranet.epa.gov/privacy http://intranet.epa.gov/foia

1-866-411-4372



Records Management Briefing for Senior Officials and Political Appointees

Recipient of Briefing

Name:	
Title :	
Signature Confirming Receipt of Briefing:	
Date: Briefing Presenter	(signature)
Name:	
Title:	
Signature Confirming Delivery of Briefing: _	
Date:	(signature)

From: Katims, Casey [Katims.Casey@epa.gov]

Sent: 4/16/2021 1:34:38 AM

To: Katims, Casey [Katims.Casey@epa.gov]; Utech, Dan [Utech.Dan@epa.gov]; Goffman, Joseph

[Goffman.Joseph@epa.gov]; Carbonell, Tomas [Carbonell.Tomas@epa.gov]; Nunez, Alejandra

[Nunez.Alejandra@epa.gov]; Bowles, Jack [Bowles.Jack@epa.gov]; Fericelli, Paul [fericelli.paul@epa.gov]; Arroyo,

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CC: Kim, Eun [Kim.Eun@epa.gov]; Dunham, Sarah [Dunham.Sarah@epa.gov]; Grundler, Christopher

[grundler.christopher@epa.gov]; Gunning, Paul [Gunning.Paul@epa.gov]; Tsirigotis, Peter [Tsirigotis.Peter@epa.gov]

Subject: U.S. Climate Alliance-EPA Intro Meeting

Attachments: 210416_EPA&USCA_Agenda.docx; 210416_EPA&USCA_Participant List.docx

Location: Zoom

Start: 4/16/2021 7:00:00 PM **End**: 4/16/2021 8:00:00 PM

Show Time As: Busy

Required Utech, Dan; Goffman, Joseph; Carbonell, Tomas; Nunez, Alejandra; Bowles, Jack; Fericelli, Paul; Vicki Arroyo

Attendees:

Optional Kim, Eun; Dunham, Sarah; Grundler, Christopher; Gunning, Paul; Tsirigotis, Peter

Attendees:

UPDATE: Final agenda and participant list attached. Please note CARB Chair Liane Randolph will open the meeting for U.S. Climate Alliance.

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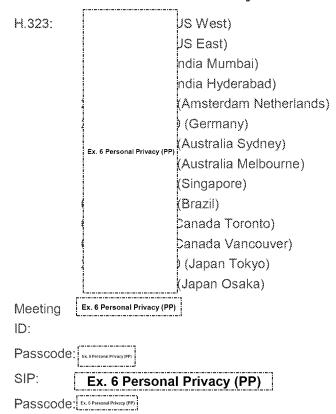


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